



CERTIFIED PUBLIC ACCOUNTANTS

Return Mail Processing

PO Box 589

Claysburg, PA 16625-0589

July 11, 2023



**Re: Notice of Data Security Incident**

Dear [REDACTED]:

We are writing to inform you of a data security incident that may have affected your personal information. At Heard, McElroy, & Vestal LLC (“HMV”), we are committed to maintaining our clients’ trust and demonstrating our commitment to the privacy and security of all information in our possession. That is why we are writing to notify you of this incident, to offer you complimentary credit monitoring and identity theft restoration services, and to inform you about steps that can be taken to help safeguard your personal information.

**What Happened:** On or around February 13, 2023, HMV began receiving rejection notices for tax returns filed on behalf of some of its clients’ employees. We immediately began investigating these claims and enlisted the assistance of cybersecurity and other technical experts to investigate what happened and whether personal information in HMV’s possession was accessed without authorization. The investigation revealed that an unknown actor gained access to some client information stored on a third-party software program used by HMV. We then undertook a thorough review of the information potentially involved in the incident to identify individuals who were potentially impacted as a result of it. We recently determined that your personal information may have been involved in this incident. We then worked to obtain up to date contact information to notify you about it.

In response to the incident, we have taken immediate steps to evaluate and improve the security of our systems and will continue to evaluate additional protections that can be put into place to supplement our existing security policies and procedures as the investigation continues.

**What Information Was Involved:** The information affected may have included the information reflected on your tax return and related documents, including your name, date of birth, Social Security number, and financial account number.

**What We Are Doing:** Upon discovering this incident, in addition to taking the steps described above, we immediately notified the Federal Bureau of Investigation (“FBI”), the Internal Revenue Service (“IRS”), and the State Tax Administrators. We have been in contact with the IRS and State Tax Administrators to provide relevant information about this incident and will continue to provide whatever cooperation is necessary to hold the perpetrator(s) of this incident accountable.

To help protect your identity, we are offering complimentary access to Experian IdentityWorks<sup>SM</sup> for 12 months.

Please note that Identity Restoration is available to you for 12 months from the date of this letter and does not require any action on your part at this time. The Terms and Conditions for this offer are located at [www.ExperianIDWorks.com/restoration](http://www.ExperianIDWorks.com/restoration).

**333 Texas Street, Suite 1525  
Shreveport, LA 71101**

9745596v3

B096143

0000501



J6686-L01

While identity restoration assistance is immediately available to you, we also encourage you to activate the fraud detection tools available through Experian IdentityWorks as a complimentary 12-month membership. This product provides you with superior identity detection and resolution of identity theft. To start monitoring your personal information, please follow the steps below:

- Ensure that you **enroll by** September 30, 2023 (Your code will not work after this date.)
- **Visit** the Experian IdentityWorks website to enroll: <https://www.experianidworks.com/credit>
- Provide your **activation code**: [REDACTED]

If you have questions about the product, need assistance with Identity Restoration that arose as a result of this incident, or would like an alternative to enrolling in Experian IdentityWorks online, please contact Experian's customer care team at **(833) 637-2101** by September 30, 2023. Be prepared to provide engagement number [REDACTED] as proof of eligibility for the Identity Restoration services by Experian.

### **ADDITIONAL DETAILS REGARDING YOUR 12-MONTH EXPERIAN IDENTITYWORKS MEMBERSHIP**

A credit card is not required for enrollment in Experian IdentityWorks. You can contact Experian immediately regarding any fraud issues, and have access to the following features once you enroll in Experian IdentityWorks:

- **Experian credit report at signup:** See what information is associated with your credit file. Daily credit reports are available for online members only.\*
- **Credit Monitoring:** Actively monitors Experian file for indicators of fraud.
- **Identity Restoration:** Identity Restoration specialists are immediately available to help you address credit and non-credit related fraud.
- **Experian IdentityWorks ExtendCARE™:** You receive the same high-level of Identity Restoration support even after your Experian IdentityWorks membership has expired.
- **\$1 Million Identity Theft Insurance\*\*:** Provides coverage for certain costs and unauthorized electronic fund transfers.

\* Offline members will be eligible to call for additional reports quarterly after enrolling.

\*\* The Identity Theft Insurance is underwritten and administered by American Bankers Insurance Company of Florida, an Assurant company. Please refer to the actual policies for terms, conditions, and exclusions of coverage. Coverage may not be available in all jurisdictions.

**What You Can Do.** We recommend that you activate your complimentary services using the enrollment code provided below. We also recommend that you review the guidance included with this letter about how to protect your personal information.

**For More Information.** We sincerely regret any inconvenience or concern caused by this incident. If you have further questions or concerns, or would like an alternative to enrolling online, please call **(833) 637-2101** toll-free Monday through Friday from 8 am – 10 pm Central, or Saturday and Sunday from 10 am – 7 pm Central (excluding major U.S. holidays). Be prepared to provide your engagement number [REDACTED].

HMV takes your trust in us and this matter very seriously. Please accept our sincere apologies and know that we deeply regret any worry or inconvenience this may cause you.

Sincerely,



Roy Prestwood, Managing Partner

**333 Texas Street, Suite 1525  
Shreveport, LA 71101**

9745596v3

B096143

J6686-L01

## Steps You Can Take to Protect Your Personal Information

**Review Your Account Statements and Notify Law Enforcement of Suspicious Activity:** As a precautionary measure, we recommend that you remain vigilant by reviewing your account statements and credit reports closely. If you detect any suspicious activity on an account, you should promptly notify the financial institution or company with which the account is maintained. You also should promptly report any fraudulent activity or any suspected incidence of identity theft to proper law enforcement authorities, your state attorney general, and/or the Federal Trade Commission (FTC).

**Copy of Credit Report:** You may obtain a free copy of your credit report from each of the three major credit reporting agencies once every 12 months by visiting <http://www.annualcreditreport.com/>, calling toll-free 1-877322-8228, or by completing an Annual Credit Report Request Form and mailing it to Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA 30348. You also can contact one of the following three national credit reporting agencies:

**Equifax**

P.O. Box 105788  
Atlanta, GA 30348  
1-888-378-4329  
[www.equifax.com](http://www.equifax.com)

**Experian**

P.O. Box 9532 Allen,  
TX 75013  
1-800-831-5614  
[www.experian.com](http://www.experian.com)

**TransUnion**

P.O. Box 1000 Chester, PA 19016  
1-800-916-8800 [www.transunion.com](http://www.transunion.com)

**Fraud Alert:** You may want to consider placing a fraud alert on your credit report. An initial fraud alert is free and will stay on your credit file for at least one year. The alert informs creditors of possible fraudulent activity within your report and requests that the creditor contact you prior to establishing any accounts in your name. To place a fraud alert on your credit report, contact any of the three credit reporting agencies identified above. Additional information is available at <http://www.annualcreditreport.com>.

**Security Freeze:** You have the right to put a security freeze on your credit file for up to one year at no cost. This will prevent new credit from being opened in your name without the use of a PIN number that is issued to you when you initiate the freeze. A security freeze is designed to prevent potential creditors from accessing your credit report without your consent. As a result, using a security freeze may interfere with or delay your ability to obtain credit. You must separately place a security freeze on your credit file with each credit reporting agency. In order to place a security freeze, you may be required to provide the consumer reporting agency with information that identifies you including your full name, Social Security number, date of birth, current and previous addresses, a copy of your state-issued identification card, and a recent utility bill, bank statement or insurance statement.

**Additional Free Resources:** You can obtain information from the consumer reporting agencies, the FTC, or from your respective state Attorney General about fraud alerts, security freezes, and steps you can take toward preventing identity theft. You may report suspected identity theft to local law enforcement, including to the FTC or to the Attorney General in your state.

**Federal Trade Commission**

600 Pennsylvania Ave, NW Washington,  
DC 20580 [consumer.ftc.gov](http://consumer.ftc.gov)  
1-877-438-4338

**Maryland Attorney General**

St. Paul Plaza  
200 St. Paul Place  
Baltimore, MD 21202  
[marylandattorneygeneral.gov](http://marylandattorneygeneral.gov)  
1-888-743-0023

**New York Attorney General**

Bureau of Internet and  
Technology Resources  
28 Liberty Street  
New York, NY 10005  
[ag.ny.gov](http://ag.ny.gov)  
1-212-416-8433 / 1-800-771-7755

**North Carolina Attorney General**

9001 Mail Service Center  
Raleigh, NC 27699  
[ncdoj.gov](http://ncdoj.gov)  
1-877-566-7226

**Rhode Island Attorney General**

150 South Main Street  
Providence, RI 02903  
<http://www.riag.ri.gov>  
[riag.ri.gov](http://riag.ri.gov)  
1-401-274-4400

**Washington D.C. Attorney General**

400 S 6th Street, NW  
Washington, DC 20001  
[oag.dc.gov](http://oag.dc.gov)  
1-202-727-3400

**You also have certain rights under the Fair Credit Reporting Act (FCRA):** These rights include to know what is in your file; to dispute incomplete or inaccurate information; to have consumer reporting agencies correct or delete inaccurate, incomplete, or unverifiable information; as well as other rights. For more information about the FCRA, and your rights pursuant to the FCRA, please visit [https://files.consumerfinance.gov/f/201504\\_cfpb\\_summary\\_your-rights-under-fcra.pdf](https://files.consumerfinance.gov/f/201504_cfpb_summary_your-rights-under-fcra.pdf).

333 Texas Street, Suite 1525  
Shreveport, LA 71101

9745596v3

B096143

0000501



J6686-L01

